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IDENTIFIERS	Names; Politeness; *Telephone Directories

ABSTRACT

Instructional materials for telephone usage instruction address both personal and job-related telephone use needs. Six units are included on these topics: (1) telephone buttons and sounds, telephone book use, American names, telephone numbers, and taking messages; (2) greetings, information seeking, and carrying on a dialogue; (3) taking a message for a co-worker, intonation, and handling emergency calls; (4) giving confidential medical information; (5) polite questioning, discussing medical problems and symptoms, making and accepting referrals, handling troublesome calls; and (6) scheduling appointments. Exercises, primarily dialogues and completion exercises, are included in each unit. (MSE) (Adjunct ERIC Clearinghouse on Literacy Education)

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ED 377 743

TELEPHONE TRAINING

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Bilingual Vocational Training
Career Resources Development Center
655 Geary Street
San Francisco, CA 94102

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FL 900840

UNIT 1 INTRODUCTION

SECTION 1: THE TELEPHONE

1. Do you have a telephone at home?
2. Look at your teacher's telephone. What are the differences between that phone and your telephone at home?

a rotary phone

BUTTONS, SIGNAL LIGHTS, SOUNDS

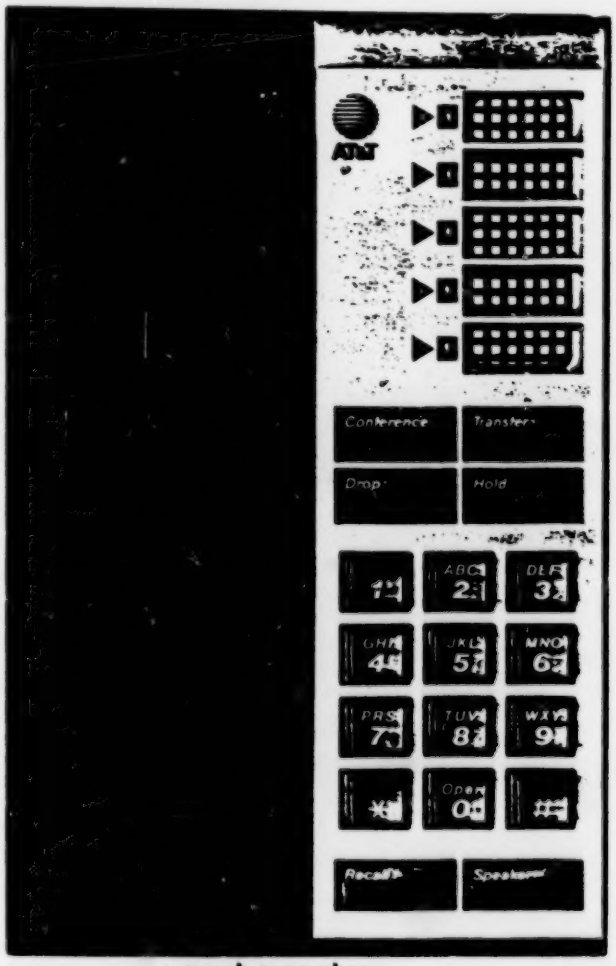
BUTTONS:	Hold, Transfer Intercom, Speaker
LIGHTS:	red, green, blinking
SOUNDS:	ringing, buzzing

Hold
To hold an outside call while making or answering another call, press this "HOLD" button (the signal light then starts blinking) and proceed with other call.

Transfer
To transfer an outside call to another extension, press this "TRANSFER" button. The signal light then begins to blink.

Intercom
Press this "INTERCOM" button and enter an extension number to talk to another employee. A blinking light and buzzing sound indicate that one employee wants to talk to another by intercom.

Speaker
To turn on the speaker in the phone, press this "SPEAKER" button. Press the same button again to turn off the speaker.



a touch-tone phone

SECTION 2: THE PHONE BOOK

1. Have you used a phone book before?
2. What are the Yellow Pages and White Pages for?

A. ALPHABETICAL ORDER

Alphabetical Order	**Not in alphabetical Order**
Allen	Allen
Caroll	Cunningham
Cunningham	Caroll
Edwards	Edwards
Gardner	Harris
Harris	Martin
Hart	Hawkins
Hawkins	Thompson
Martin	Hart
Perkins	Perkins
Thompson	White
White	Gardner

Put the following names in alphabetical order.

a.		b.	
Smith	_____	Moore	_____
Johnson	_____	Thomas	_____
Williams	_____	Martin	_____
Brown	_____	Thompson	_____
Jones	_____	White	_____
Miller	_____	Harris	_____
Davis	_____	Jackson	_____
Wilson	_____	Clark	_____
Anderson	_____	Lewis	_____
Taylor	_____	Walker	_____

B. USING THE YELLOW PAGES
(There are two books: A - L and M - Z)

The Blue Section:

1. What's included in this BLUE section? (see *Yellow Pages A-M* page 1)
2. Look in the blue section. Work with a partner and write down the phone numbers of the following places.

   a. San Francisco Community College District Adult Education Information _____
   b. Wu Yee Children's Services _____
   c. Asian Art Museum _____
   d. On which page is CRDC listed? _____
   e. Which post offices in San Francisco are open on Sundays? _____
   f. Which pages are in Chinese? _____

The Green Section:

1. What's included in this GREEN section? (see page 1)
2. Can you tell that the subject indexes on page 1 are the indexes of page 2 through 15? and the indexes from page 2 to 15 are indexes for the whole section?
3. Fine the phone numbers of the following places in the green section.

   a. Cancer Support and Education Center _____
   b. Delta Airline Passenger reservations and information _____
   c. Radio Shack on West Portal _____
   d. New Asia Restaurant _____

The Yellow Section:

1. Should you look up Delta Airline's number under "D" in this section?
2. Do you agree that the green section serves as inde .es of the yellow section?

C. USING THE WHITE PAGES

The first white section:

1. How many parts are there in this section?
2. What's each part about?
3. Which pages are in Spanish?

The Blue Section (A - L):

1. What is another name for this section? ***Government Pages***
2. Which pages serve as the subject indexes?
3. Find the numbers of the following government offices.
   a. San Francisco Hall of Justice _____
      District Attorney
   b. San Francisco Health Department _____
      Birth Certificate information
   c. State Dept. of Consumer Affairs _____
      Consumer Information
   d. Department of Justice _____
      Immigration and Naturalization Service

The Pink Section:

1. What is another name for this section? ***Business White Pages***
2. Should you look for Delta Airline's number under "D" in this section?
3. Write the numbers of Delta Airline _____
   New Asia Restaurant _____
   Are the numbers the same or different from those of the Yellow Pages?

The White Section:

1. What is another name for this section? ***Residence White Pages***
2. Write down the telephone numbers of the following people.
   a. Keith Knight, Jr. _____
   b. Warren Morris _____
   c. Collins O'Neill _____
   d. Chris Bragg _____

ON YOUR OWN

1. Your friend is going to visit you in San Francisco. She likes to go shopping in big department stores or shopping malls/centers. Find three department stores or shopping centers and write down their names and telephone numbers so that you can call and find out about their business hours.

NAME	NUMBER
_____	_____
_____	_____
_____	_____

2. Your colleague's cat is sick and she asks you if you know any vet in the Sunset district. Find one for her and write down the vet's name, address and phone number.

3. You found a dog on the street. It has a tag like this:

SPOT belongs to C. Rocha 1480 Sutter

Look for Spot's owner's name so that you can call him/her to pick up the dog.

4. Your boss dropped a roll of film at a photo shop and he needs you to pick up the prints. He only remembers the name of that photo shop: Golden Gate Photo Center. Find out about their address and phone number.

5. Your friend is going to visit you at work. Find a cafeteria in the downtown area. Write down its address and phone number.

6. Some friends of yours at work decided to go to a movie on Friday night. Find at least two movie theaters in the Richmond district and write down the names, addresses and phone numbers.

7. Your supervisor wants to take computer classes. She asks you to find a few computer centers in downtown or south of Market area. List three places including their addresses and phone numbers.

8. Project HIRE is a subcontractor of the San Francisco Private Industry Council (PIC). Can you find its address and phone number in the phone directory?

9. On your way to CRDC, you notice that there's a hole in your shoe. Look in the phone book and find a shoe repair shop closest to CRDC.

10. You lost your Visa card. Find the number with which you can call and report your card missing.

11. You need to meet a company accountant in a bank at 279 West Portal but you forgot which bank it was. Find it out and write the name and number below.

SECTION 3: COMMON AMERICAN NAMES

A. MOST COMMON AMERICAN FAMILY NAMES

1.	Adams	31.	Edwards	61.	Knight	91.	Riley
2.	Allen	32.	Fitzgerald	62.	Lane	92.	Roberts
3.	Anderson	33.	Elliot	63.	Larson	93.	Robbins
4.	Andrew	34.	Evans	64.	Lee	94.	Roberson
5.	Armstrong	35.	Ferguson	65.	Lewis	95.	Robinson
6.	Arnold	36.	Fisher	66.	Little	96.	Rodriguez
7.	Baker	37.	Flores	67.	Mann	97.	Rogers
8.	Ball	38.	Frazier	68.	Martin	98.	Rose
9.	Berry	39.	Gardner	69.	McLaughlin	99.	Sanchez
10.	Bradley	40.	Grant	70.	Mitchell	100.	Schwartz
11.	Brown	41.	Graves	71.	Matthews	101.	Scott
12.	Burke	42.	Green	72.	Miller	102.	Shelton
13.	Bush	43.	Greene	73.	Mills	103.	Smith
14.	Byrd	44.	Gregory	74.	Moore	104.	Stephens
15.	Campbell	45.	Gross	75.	Morris	105.	Taylor
16.	Carlson	46.	Hale	76.	Murphy	106.	Thomas
17.	Carpenter	47.	Hall	77.	Neal	107.	Thompson
18.	Caroll	48.	Hansen	78.	Nelson	108.	Torres
19.	Carter	49.	Harding	79.	Nichols	109.	Turner
20.	Chapman	50.	Harris	80.	O'Brien	110.	Vaughn
21.	Christensen	51.	Hart	81.	O'Connor	111.	Walker
22.	Clark	52.	Hawkins	82.	Quinn	112.	Walters
23.	Cohen	53.	Hill	83.	Page	113.	Washington
24.	Collins	54.	Horton	84.	Parker	114.	Watts
25.	Cook	55.	Hudson	85.	Payne	115.	Weaver
26.	Cunningham	56.	Jackson	86.	Perkins	116.	Wheeler
27.	Daniels	57.	Jacobson	87.	Peterson	117.	White
28.	Davis	58.	Johnson	88.	Pierce	118.	Williams
29.	Dixon	59.	Jones	89.	Phillips	119.	Willis
30.	Doyle	60.	King	90.	Ray	120.	Wilson
	Duncan						Wright

B. MOST COMMON AMERICAN NAMES (MEN)

1. Aaron
2. Abraham, Abe
3. Adam
4. Adrian
5. Al, Alan, Allan, Allen
6. Albert, Al, Bert
7. Alex, Alexander Al, Alfred
8. Andrew, Andy
9. Archibold, Archie, Arch
10. Arnold, Arnie
11. Art, Arthur
12. Barry
13. Bart
14. Benjamin, Ben, Benny
15. Bernard, Bernie
16. Burton, Burt, Bert
17. Brent
18. Brian, Bryan
19. Bruce
20. Carl, Karl
21. Charles, Charlie, Chuck
22. Claud, Claude
23. Christopher, Christian, Chris
24. Clayton, Clay
25. Clint
26. Clifford, Cliff
27. Conrad
28. Craig
29. Curtis, Curt, Kurt
30. Dale
31. Daniel, Dan, Danny
32. David, Dave, Davey
33. Dennis, Denny
34. Douglas, Doug
35. Donald, Don, Donny
36. Earl, Earle
37. Edgar, Ed
38. Edmond, Edmund, Ed
39. Edward, Edwin, Ed, Eddie, Ted, Ned
40. Ernest, Ernie
41. Erwin, Irwin
42. Eugene, Gene
43. Evan
44. Felix
45. Floyd
46. Francis
47. Franklin, Frank, Frankie
48. Frederick, Fred, Freddy, Freddie
49. Fritz
50. Gary
51. Gene, Eugene
52. Geoffrey, Jeffrey, Jeff
53. George
54. Gerald, Jerry
55. Gilbert, Gil
56. Glenn, Glen
57. Gordon
58. Gregory, Greg
59. Guy
60. Harold, Harry
61. Harvey, Harv
62. Henry, Hank, Hal
63. Herbert, Herb, Herbie
64. Herman, Hermann
65. Howard
66. Hugh, Hugo
67. Ira
68. Irvin, Irving, Irv
69. Irwin
70. Isaac
71. Ivan
72. Jacob, Jake
73. James, Jim, Jimmy
74. Jeremy
75. Jerome, Jerry
76. Joel
77. John, Jack, Johnny
78. Jonathan, Jon
79. Joseph, Joe
80. Jose
81. Keith
82. Kenneth, Ken, Kenny
83. Kevin
84. ~~Kirt~~ Kirk
85. Kurt
86. Lawrence, Larry
87. Lee, Leigh
88. Leo, Leon
89. Leonard, Len
90. Louis, Lewis, Louie, Lou
91. Lloyd
92. Marcus, Marc, Mark
93. Martin, Marty
94. Marvin
95. Matthew, Matt
96. Morris, Maurice
97. Maxwell, Max
98. Melvin, Mel
99. Michael, Mike, Mick, Mickey
100. Miles

10

101. Milton, Milt
102. Mitchell, Mitch
103. Malcolm
104. Mort
105. Nathaniel, Nathan, Nate
106. Neil, Neal
107. Nicholas, Nick
108. Norman, Norm
109. Oliver, Ollie
110. Oscar
111. Owen
112. Patrick, Pat
113. Paul
114. Percy
115. Perry

116. Peter, Pete
117. Philip, Phillip, Phil
118. Quentin
119. Ralph
120. Randolph, Randy
121. Raymond, Ray
122. Reginald, Reggie
123. Rex
124. Richard, Rick, Dick, Rich, Richie
125. Robert, Bob, Rob, Robby, Bobby
126. Rodney, Rod
127. Robin
128. Richardo, Eric
129. Roger, Rodger, Rodge
130. Roy
131. Rudolph, Rudy
132. Ronald, Ron, Ronnie
133. Russell, Russ
134. Randell, Randal Randy
135. Steven, Stephen Steve
136. Samuel, Sam, Sammy
137. Scott, Scotty, Scottie
138. Sheldon
139. Sidney, Sid
140. Simon

141. Stanley, Stan
142. Stuart, Stewart, Stu
143. Terence, Terrence, Terry
144. Theodore, Ted, Teddy
145. Thomas, Tom, Tommy
146. Timothy, Tim, Timmy
147. Anthony, Tony
148. Victor, Vic
149. Vincent, Vince
150. William, Wilson Will, Willy, Bill, Billy
151. Wallace, Wally
152. Walter, Walt
153. Warren
154. Wayne
155. Wesley, Wes
156. Wilbur
157. Woodrow, Woody

C. MOST COMMON AMERICAN NAMES (WOMEN)

1. Ann, Anne, Annette, Annie, Anna
2. Ali, Alexandra
3. Abigail, Abby, Gail, Gayle
4. Adrienne
5. Agnes
6. Alice
7. Alicia
8. Allison
9. Amelia
10. Amy
11. Angela
12. Anita
13. Audrey
14. Barbara, Babs, Barb Bobbie
15. Beatrice, Bea
16. Bernadette
17. Beverly, Bev
18. Bridget, Bridgette
19. Bernice
20. Camilla
21. Candice, Candy
22. Carla
23. Carolyn, Carol, Carole
24. Caroline, Carrie
25. Catherine, Cathy, Cathie
26. Kathryn, Kathy, Kathie, Kate
27. Katy, Katie, Kay, Kathleen
28. Cecilia, Celia
29. Charlene
30. Charlotte
31. Christina, Christine, Chris, Christie, Tina
32. Clara, Clare, Claire
33. Claudia
34. Colette
35. Constance, Connie
36. Corinne
37. Cynthia, Cindy
Cheryl
38. Daisy
39. Darlene
40. Dawn
41. Deborah, Debora, Debra, Debby, Debbie
42. Delia
43. Denise
44. Diana, Dianna, Diane, Dianne
45. Dolly
46. Dolores
47. Donna
48. Dora, Doreen
49. Doris
50. Dorothy, Dody, Dot, Dottie
51. Edith, Edie
52. Edna
53. Eileen, Aileen
54. Elaine
55. Eleanor, Eleanore, Lenore, Leanore Nora, Ellie
56. Elizabeth, Beth, Betty, Betsy, Lisa, Liz, Lizzie
57. Ella
58. Ellen
59. Emily
60. Erica
61. Ernestine
62. Evelyn, Eve, Eva
63. Faye, Fay
64. Florence
65. Frances, Fran, Franny
66. Francine
67. Geraldine, Gerry, Gerri
68. Gertrude, Trudy
69. Ginger
70. Gladys
71. Gloria
72. Georgia
73. Grace
74. Gretchen
75. Gwendolyn, Gwen
76. Hannah
77. Hazel
78. Heather
79. Helen
80. Hellana
81. Helene
82. Henrietta
83. Harriet
84. Hilary
85. Hilda
86. Holly
87. Ida
88. Imogene
89. Ingrid
90. Irene, Rene
91. Iris
92. Irma
93. Isabel, Isabelle
94. Jacqueline, Jacquelyn, Jackie
95. Janet, Janette, Jane, Jan
96. Janice
97. Jean, Jeanne, Jeannie
98. Jeanette, Jeannette
99. Jeanine, Jeanine
100. Jennifer, Jenny

101. Jessica
102. Jill
103. Joan, Joanne Joanna, Joannie
104. Josephine, Jo, Josie
105. Joy, Joyce
106. Judith, Judy
107. Julia, Julie, Juliette
108. Juliana
109. June
110. Justine
111. Karen, Karin
112. Kimberly, Kim
113. Kristin

Lisa

114. Liza
115. Lillian, Lily, Lil
116. Laura, Laurie
117. Lee
118. Leah
119. Leslie
120. Linda, Lynda, Lynette, Lynn, Lynne
121. Louella, Lou
122. Lucille, Lou, Lucy
123. Louisa, Louise
124. Lois
125. Loretta
126. Loraine, Lorraine, Lorrie
127. Madeline, Madeleine
128. Marcella, Marcie, Marcy
129. Marsha, Marcia
130. Margaret, Marguerite, Margo, Peggy, Peg, Marg, Meg Midge, Madge
131. Marjorie, Marj Margie, Marge
132. Marilyn, Marilynn
133. Marlene
134. Martha
135. Mary, Maria, Marie, Marion, Miriam
136. Marianne, Maryann, Maryanne, Mary Ann
137. Maureen
138. Melanie
139. Melissa
140. Michele, Michelle
141. Mildred, Millie
142. Molly
143. Nancy, Nan
144. Naomi
145. Nellie
146. Nina
147. Nora, Noreen
148. Natalie, Natasha
149. Olga
150. Olivia
151. Pamela, Pam
152. Patricia, Pat, Patty, Trish, Tricia
153. Paula, Pauline, Polly
154. Pearl
155. Penelope, Penny
156. Phyllis
157. Rachel
158. Rebecca, Becky
159. Regina, Gina
160. Rita
161. Roberta, Robbie
162. Robin
163. Ruth, Ruthie
164. Rosalie
165. Rosalind, Rosalyn
166. Rosa, Rose, Rosie
167. Rosemary
168. Roxanne
169. Sandra, Sandy
170. Samantha
171. Sarah, Sara
172. Sally
173. Sharon, Sherry Sheri
174. Shelia
175. Shirley
176. Sophia, Sophie
177. Stephanie
178. Susan, Sue, Susie, Susanne Susannah
179. Sylvia
180. Therasa, Theresa, Therry, Terri
181. Ursula
182. Valerie, Val
183. Vanessa
184. Veronica, V icki, Vickie Vicky
186. Virginia, Ginny, Gina, Ginger
187. Wanda
188. Wendy
189. Wilma
190. Winifred, Winnie
191. Yolanda
192. Yvonne
193. Zelda

VICTORIA

NAMES AND SUFFIXES

1. Look at the list of COMMON AMERICAN FAMILY NAMES on page 5. What suffixes can you sort out? List at least *four* below. Write the suffixes on top and list all the names you find.

-ton	_____	_____	_____

2. What other suffixes do you know? List them below.

_____ _____ _____

_____ _____ _____

LISTENING & SPELLING

Listen to the names. After each name, there will be a pause. During the pause you repeat the name and try to write it. Then the name will be spelled. Check your spelling as it is given to you.

For example: A: This is Mrs. Stevenson.
B: Stevenson?
A: Yes, Stevenson. S-T-E-V-E-N-S-O-N.
B: S-T-E-V-E-N-S-O-N.

A. Suffix: -son

1. _____
2. _____
3. _____
4. _____
5. _____

B. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

C. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

D. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

E. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

F. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

G. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____

H. Suffix:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____

REVIEW

Listen and write down the names with different suffixes.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____

SECTION 4: TELEPHONE NUMBERS

You may hear people give a telephone number in many different ways which you also need to get used to. Practice the examples and then practice writing the numbers you hear.

1. Give a telephone number by saying each digit as a separate number. Pause after the first three digits.
   Examples:
   726-2422 (seven two six - two four two two)
   923-2318 (nine two three - two three one eight)

   Listen and write the numbers. Then practice giving the numbers with a partner.

   _____ _____
   _____ _____
   _____ _____

2. Give a phone number by say two digits as a unit.
   Examples:
   726-2422 (seven two six - *twenty-four twenty-two*)
   923-2318 (nine two three - *twenty-three eighteen*)

   Listen and write the numbers. Then practice giving the numbers with a partner.

   _____ _____
   _____ _____
   _____ _____

3. 0 is usually pronounced as the letter O (oh) if it is pronounced separately.
   Examples:
   775-8880 (seven seven five - eight eight eight *oh*)
   653-0150 (six five three - *oh* one five *oh*)

   Listen and write the numbers. Then practice giving the numbers with a partner.

   _____ _____
   _____ _____
   _____ _____

4. A number ending with 00 is pronounced as "hundred".
Examples:
460-1400 (four six oh - one *four hundred*)
372-8200 (three seven two - eight *two hundred*)

Listen and write the numbers. Then practice giving the numbers with a partner.

_____ _____
_____ _____
_____ _____

5. 000 ending is pronounced as "thousand."
Examples:
961-1000 (nine six one - *one thousand*)
850-4000 (eight five oh - *four thousand*)

Listen and write the numbers. Then practice giving the numbers with a partner.

_____ _____
_____ _____
_____ _____

6. Give the area code by saying "area code" first. Pause between the area code and the phone number.
Examples:
(415) 775-8880 (*area code* four one five, seven seven five - eight eight eight oh
or area code four one five, seven seven five - eighty-eight, eighty)
(510) 268-8886 (*area code* five one oh, two six eight, eight eight eight six)

Listen and write the numbers. Then practice giving the numbers with a partner.

_____ _____
_____ _____
_____ _____

7. Give the extension number by saying "extension" first. Pause between the main number and the extension number. If the extension has only two digits, say them as a unit.
Examples:
268-8886 ext. 35 (two six eight - eight eight eight six *extension thirty-five*)
885-0460 ext 264 (eight eight five - oh four six oh *extension two six four*)
704-0300 ext 1052 (seven oh four - oh three hundred *extension one oh five* two)

Listen and write the numbers. Then practice giving the numbers with a partner.

_____ _____

_____ _____

_____ _____

REVIEW

Listen and write down the numbers.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

SECTION 5: TAKING A MESSAGE

1. When do you need to take a message?

   _____

2. What is included in the message?

   _____

3. What do you do when you don't know the spelling of a name?

   _____

   _____

4. What do you do when people don't understand how *your* spell a name?

   _____

   _____

LISTENING

A. Listen to the dialogues and write down the names and phone numbers.

	NAMES	NUMBERS
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

B. Listen and write down the names. Each name is spell once only.

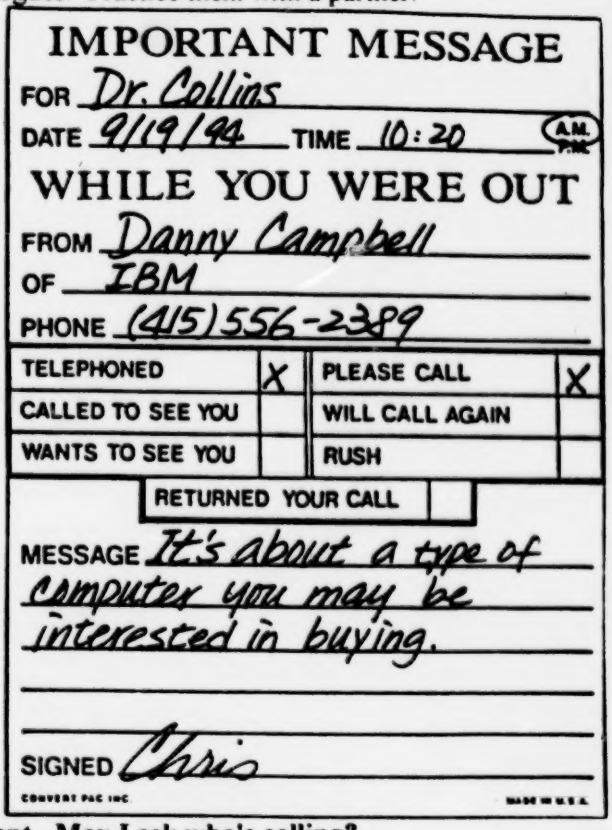
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

C. Listen and write down the numbers.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

DIALOGUES

Listen to the telephone dialogues. Pay attention to hos the assistant answers the phone and takes a message. Then, listen and read the dialogues. Practice them with a partner.


IMPORTANT MESSAGE

FOR Dr. Collins

DATE 9/19/94 TIME 10:20 A.M. P.M.

WHILE YOU WERE OUT

FROM Danny Campbell

OF IBM

PHONE (415)556-2389

TELEPHONED	X	PLEASE CALL	X
CALLED TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL			

MESSAGE It's about a type of computer you may be interested in buying.

SIGNED Chris

COUVERT PAC INC

Dialogue 1

Assistant: Doctor's office. May I help you?
Caller: Yes. This is Danny Campbell at IBM. Is Dr. Collins available?
Assistant: **I'm sorry, Dr. Collins is with a patient right now. May I ask what this is for?**
Caller: This is about a type of computer Dr. Collins may be interested in purchasing. I'll appı ciate it if you ask him to call me at 556-2389.
Assistant: 556-2389. And what's your first name again?
Caller: Danny. Danny Campbell.
Assistant: Thank you, Mr. Campbell. **I'll make sure Dr. Collins gets the message.**
Caller: Thanks. Bye.

Dialogue 2

Assistant: Doctor's office. May I help you?
Caller: Could I have Dr. Collins, please?
Assistant: **I'm sorry, Dr. Collins is with a patient. May I ask who's calling?**
Caller: This is Arnold Christensen at Alamo Rental. I need to know how long Dr. Collins wants to keep the car.
Assistant: All right, I'll get this message to Dr. Collins. What's your name again?
Caller: Arnold Christensen.
Assistant: Could you spell it?
Caller: It's Arnold, A-R-N-O-L-D, C-H-R-I-S-T-E-N-S-E-N.
Assistant: And your phone number, Mr. Christensen?
Caller: It's 721-0247.
Assistant: 721?
Caller: 0247.
Assistant: 0247.
Caller: And it's really important that Dr. Collins gets this message and call us back as soon as possible.
Assistant: Yes, Mr. Christensen. **I'll have Dr. Collins return your call as soon as he's available.**
Caller: Thank you very much. Bye.

Dialogue 3

Archie is another assistant at Dr. Collins' office.

Assistant:	Doctor's office. May I help you?
Caller:	Is Archie there?
Assistant:	I'm sorry, **he's out of the office. May I ask who's calling?**
Caller:	This is Denny Lee, his roommate. When will he be back?
Assistant:	I'm not quite sure. **Would you like to leave a message?**
Caller:	Yeah, tell him I lost my house key and I need to know when he's coming home.
Assistant:	What's your phone number, Denny?
Caller:	655-3859.
Assistant:	655-3859.
Caller:	And I'll be at this number until 2:15.
Assistant:	15 or 50?
Caller:	2:15.
Assistant:	All right, **let me see if I got that.** This is Denny. You want to know when Archie's coming home tonight. You'll be at 655-3859 until 2:15 p.m.
Caller:	That's right.
Assistant:	I'll make sure Archie gets the message.
Caller:	Thanks. Bye.

IMPORTANT MESSAGE

FOR Archie

DATE 9/19/94 TIME 4:20 A.M. P.M.

MR. Denny Lee

OF (your roommate)

PHONE 415 (AREA CODE) 655-3859 (NUMBER) (EXTENSION)

☐ FAX

☐ MOBILE (AREA CODE) (NUMBER) (TIME TO CALL)

TELEPHONED	X	PLEASE CALL	X
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE Call this number by 2:15 p.m. He lost his house key and wanted to know when you're coming home tonight.

SIGNED Chris

TOPS FORM 3002P LITHO IN U.S.A.

1. In the dialogues above, why was the doctor always unavailable?
2. When do you need to take a message and when do you need to interrupt the doctor?

Take a message for the doctor except

1. _____
2. _____
3. _____

Also, check with the doctor and make a list of calls he/she would like to answer immediately.

ROLE PLAY

Find a partner and role play the following situations.

Student A

1. You work at St. Mary's Hospital. Your co-workers are not around at the moment. You are taking care of the phones. Take a message for them.

   _____

2. You work with Art Mitchell at Dr. Allen and Lewis' office. Art is taking a coffee break and thus not at his desk right now. Answer the phone and take a message for him.

   _____

3. Call your doctor, Dr. Gordon Feinstein. Leave your name and number if he's not available.

   _____

4. Your cousin, Al Phillips, is a nurse. Call him at work and leave a message if he's not in his office.

Student B

1. Your hospital bill is incorrect. Ira Frazier is the hospital accountant in charge of your bill. Call him and leave a message for him to call you back if he's out of the office.

   _____

2. Call your roommate Art Mitchell at work. You need to know if you can borrow his car tonight.

   _____

3. Your work at Dr. Feinstein's office. He is out to lunch. Take a message for him.

   _____

4. You work with Al Phillips and he is out of the office at the moment. Answer the phone and take a message for him.

GIVE IT A TRY

Read the dialogue and circle the best answer.

1.

Assistant: Dr. Payne's office. May I help you?
Caller: Dr. Payne, please.
Assistant: Dr. Payne is with a patient. May I help you?
Caller: No, this is a personal call.
Assistant: _____.

a. Would you like to call back later?
b. I'm sorry, but I have to take a message.
c. If you leave your name and number, I'll ask Dr. Payne to return your call.
d. OK, Dr. Payne will be available between 12 and 1 p.m.

2.

Assistant: Doctor's office. Can I help you?
Caller: I need to talk to Dr. Lee please.
Assistant: I'm sorry, Dr. Lee is with a patient at the moment. May I help you?
Caller: Well, I want to talk to Dr. Lee.
Assistant: _____.

a. What's your name?
b. Are you our patient?
c. May I have Dr. Lee call you back?
d. I'm really sorry, but Dr. Lee is not available right now.

3.

Assistant: Acme Design. May I help you?
Caller: Mr. Adam Byrd, please.
Assistant: I'm sorry, Mr. Byrd is in a meeting. _____?

a. May I take a message?
b. May I ask who's calling?
c. May I have him call you back?
d. Is there anyone else you'd like to talk to?

4.

Assistant: Human Resource. This is Jane.
Caller: Chris Anderson, please.
Assistant: _____.
(not available, offer help)

UNIT 2 TELEPHONE COMMUNICATION

SECTION 1: GREETINGS

A. Appropriate Greetings

Example 1: "Good morning, Doctor's office. May I help you?"
Example 2: "Good morning, Dr. Ferguson's office. May I help you?"
Example 3: "Good morning, Doctors' office. May I help you?"
Example 4: "Good morning, Drs. Dansen and Jones. May I help you?"

B. Inappropriate Greetings

Example: "Good morning, Drs. Cohen, Rogers, Wong and Chan. May I help you?"

SECTION 2: GETTING INFORMATION ON THE PHONE

GETTING READY

1. What do you say when you call your doctor the first time?
2. What do you need to ask when the caller is a new patient?

LISTENING

Listen to the dialgoues between a medical assistant and a patient. Answer the quesitons.

Dialogue 1: Was the assistant's greeting appropriate?
Was the caller a new patient?
What's the patient's name and medical problem?

Dialogue 2: Was the assistant's greeting appropriate?
What's the patient's name?
What questions did the assistant ask?

DIALOGUES

Listen and read the dialogues. The, find a partner and practice them.

Dialogue 1

1. A: Good morning, Dr. Wheeler's office. May I help you?
   B: I'd like to talk to Dr. Wheeler.
   A: I'm sorry, Dr. Wheeler is with a patient. May I ask who's calling?
   B: This is George Hamilton. I'm Dr. Wheeler's patient.
   A: Would you like to make an appointment?
   B: No, I'd like to talk to Dr. Wheeler.
   A: Is your call about a medical problem?
   B: Yes.
   A: **If you tell me your symptoms, I'll check with the nurse who is available.**
   B: Well, last night I vomited several times. This morning I have diarrhea, a sore throat, and a fever. I'm a diabetic and I wonder if I should come in.
   A: Mr. Hamilton, I'm sure Dr. Wheeler will want to check you. Can you come in.....

Dialogue 2

A: Dr. Cunningham's office. May I help you?
B: I'd like to talk to Dr. Cunningham.
A: I'm sorry, Dr. Cunningham is with a patient at the moment. **May I ask who's calling?**
B: This is Abe Bradley.
A: **Are you a patient of Dr. Cunningham's?**
B: Yes.
A: **Would you like to make an appointment, Mr. Bradley?**
B: Yes, I would.
A: **What is your medical problem?**
B: I think I got the flu from one of my kids. I have a fever and a terrible sore throat.
A: **When do you think you got it?**
B: About a couple of days ago when I started sneezing.
A: **What's your temperature?**
B: About 100.
A: All right, Mr. Bradley. **Would you be able to come in....**

PRACTICE

Practice the following dialogues with a partner. Look only at your part.

Student A

Dialogue 1

Assistant: Good morning, Doctor's office. May I help you?
Patient: .....
Assistant: Are you Dr. Lee's patient?
Patient: .....
Assistant: What's the nature of the visit?
Patient: .....
Assistant: OK. How about 9:30 tomorrow morning?
Patient: .....
Assistant: All right. See you then.

Dialogue 2

Assistant: Doctor's office. May I help you?
Patient: .....
Assistant: I'm sorry, Dr. Robinson is with a patient right now. May I ask who's calling?
Patient: .....
Assistant: Are you Doctor Robinson's patient?
Patient: .....
Assistant: Would you like to make an appointment?
Patient: .....
Assistant: Is your call about a medical problem?
Patient: .....
Assistant: If you will tell me your symptoms, I'll check with the nurse who's available.
Patient: .....
Assistant: I see. Can you come in...

Student B

Dialogue 1

Assistant: .....?
Patient: This is Irving Mann. I'd like to make an appointment.
Assistant: .....?
Patient: No. This'll be my first visit.
Assistant: .....?
Patient: Well, just a regular check-up.
Assistant: .....?
Patient: That sounds fine.
Assistant: .....

Dialogue 2

Assistant: .....?
Patient: I'd like to talk to Dr. Robinson.
Assistant: .....?
Patient: This is Leila Sullivan.
Assistant: .....?
Patient: Yes, I am.
Assistant: .....?
Patient: I'd rather talk to Dr. Robinson first.
Assistant: .....?
Patient: Yes.
Assistant: .....
Patient: Well, I have been having a very slow pulse rate. I don't know what's wrong with me.
Assistant: .....

LISTENING

Listen to the dialogues between the assistant and the patients. Then, listen to the three answers following each dialogue. Choose the best answers which the assistant should say to the patients.

1.	2.	3.	4.	5.
a	a	a	a	a
b	b	b	b	b
c	c	c	c	c

ROLE PLAY

Find a partner and role play the following situation.

Student A	Student B
You work at St. Luke's Hospital. Try to get as much information as possible when a patient calls and asks for the doctor.	Call your doctor and see if you can talk to the doctor directly. You have had constipation for a few days and you want to schedule an appointment.

UNIT 3 TELEPHONE TECHNIQUES

SECTION 1: TELEPHONE GAMBITS

TAKING A MESSAGE FOR CO-WORKERS

A. WHAT TO SAY WHEN THE PERSON CALLED IS OUT

I'm sorry, he	isn't in is out of the office out to lunch is away from the office is away from his desk	right now.
	isn't available on another line is tied up	at the moment.
	just stepped out (of the office). just stepped away from his desk. out of town.	

B. GETTING MORE INFORMATION

May I ask who's calling?
May I tell him who called?
May I have your name, please?
Who shall I say called?
What is this regarding?
May I tell him the nature of the call?

C. HOW TO OFFER YOUR ASSISTANCE

Would you like to leave a message?
Would you care to leave a message?
Could/May I take a message?

Can I have him call you back?
May I ask him to return your call?
May I help you?/May I have someone else help you?
How may I help you?

D. ASKING FOR REPETITION

What's your (fist/last) name/phone number again?
What company are you with again?
How do you spell/Could you spell your name again?
Could you say that again?
What was that again?
Excuse me?/Pardon me?/I'm sorry?

E. CONFIRM/CLARIFYING INFORMATION

(Is it/Did you say) A-R-N-O-L-D?/347-2478?
15 or 50?
B as in Bart?
That's Mr. Arnold Christensen of Alamo Rental at 721-0247.

F. CLOSING

I'll get him the message	as soon as possible.
I'll make sure he gets the message	as soon as he's available.
I'll have him call you back	as soon as he comes in.

INTONATION

Rising Intonation	Rising-Falling Intonation	Falling Intonation
May I help you? help you?		How may I
What's your last name again? Could you say that again? Excuse me?		Could you spell your last name?
	May I ask who's calling? Who should I say called? May I have your name, please? Would you care to leave a message?	
Could I tell him the nature of the call?	Can I take a message? Can I have him call you back?	What is this garding?
B as in Bart? A-R-N-O-L-D? 347-2478?		
	Good morning, National Foods Good afternoon, AT&T Dr. Tomer and Shen	
		John Nelson speaking. Nelson here. Speaking. This is he.
Could you hold a minute? Could I put you on hold? Would you care to hold? Do you want to hold? Would you mind holding?	Just a minute, please. One moment, please.	Hold on. Please hold.
Would you care to continue holding? Do you want to continue holding? Would you care to keep on holding? Do you want to continue holding?		

PRACTICE

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

TOPS FORM 3002P LITHO IN U.S.A.

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

TOPS FORM 3002P LITHO IN U.S.A.

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

TOPS FORM 3002P LITHO IN U.S.A.

SECTION 3: HOLDING AND TRANSFERRING PHONE CALLS

1. Have you ever been transferred on the phone?
2. What do people say before they transfer a call?
3. Which button do you need to push when you transfer a call?

LISTENING

Listen to the dialogues and answer the following questions.

Dialogue 1

1. What did the assistant say before he transferred the call?
2. Did he ask for the caller's name?
3. Is it always necessary to ask for the caller's name?

Dialogue 2

1. What did the assistant say when he transferred the call?
2. Why did he transfer the call rather than take a message?

Dialogue 3

1. Did the assistant explain why he/she needs to put the caller on hold?
2. What choice did the assistant offer the caller?

Dialogue 4

1. What did the assistant say to the caller when he/she is on another line?
2. Did the assistant give the caller an opportunity to call back later?

DIALOGUES

Listen to and practice the dialogues.

Dialogue 1

Assistant:	Good morning, Drs. Quinn and Phillips. May I help you?
Caller:	Yes, This is Margaret Quinn, Dr. Quinn's wife. Is he available?
Assistant:	He is with a patient right now. Would you like me to interrupt him?
Caller:	Yes, please. This is urgent.
Assistant:	Sure. Hold on. I'll transfer you.
Caller:	Thank you very much.

Dialogue 2

Assistant:	Good morning, Doctor's office. May I help you?	
Caller:	Yes, please. This is Dr. Jacob Isenberg at San Francisco General. I'm returning Dr. Quinn's call.	
Assistant:	He's with a patient now but let me transfer you. Could you hold, please?	
Caller:	Certainly.	
Assistant:	Just a second.	

Dialogue 3

Assistant:	Dr. Weaver's office. May I help you?	
Patient:	I'd like to make an appointment.	Before putting a caller on hold,
Assistant:	I'm talking to someone on another line. Would you hold the line for a moment, or may I call you back?	
Patient:	I'll hold.	give a reason ,ask for
Assistant:	Thank you....	the caller's permis-
	.... Thank you for holding. Did you say you'd like to make an appointment?	sion, or ask if you can return the call.

Dialogue 4

Patient:	...My daughter seems to have lost her appetite--she's not interested in food at all. I wonder if she's become anorexic. I really don't know what to do...maybe I should make an appointment for her...	
Assistant:	Mrs. Jacobs, I'm on another line. Would you hold for a moment or call back later?	Always give the caller an opportunity to call back later.
Patient:	I think I'll make an appointment for my daughter, so why don't you call me back.	
Assistant:	Certainly. What's your number?	
Patient:	351-2948.	
Assistant:	351-2948. Thank you, Mrs. Jacobs. I'll call you right back.	
Patient:	I appreciate it. Bye.	

USEFUL EXPRESSIONS

Please hold.
Hold a moment, please.
Could you hold, please?
Would you hold while I transfer your call?

Would you hold (the line) for a moment, or
may I call you back?
Would you

I'll transfer/connect you now.
I'll put you through now.
Let me transfer/connect you now.

PRACTICE

Practice the dialogues with a partner. Fold the paper along the middle line and look only at your part. When you are finished, switch roles and practice again.

Student A

Dialogue 1

Assistant: Good morning, Doctor's office. May I help you?
Caller: .....
Assistant: Let me transfer you to Harry Watson. Please hold.

Dialogue 2

Assistant: Dr. Frazier's office. May I help you?
Caller: .....
Assistant: Dr. Frazier is with a patient. May I ask who's calling?
Caller: .....
Assistant: Please hold. I'll transfer you.
Caller: .....

Student B

Dialogue 1

Assistant: .....?
Caller: This is Irwin Mosley with Health-Med. I want to talk with your office manager about our new billing procedures
Assistant: .....

Dialogue 2

Assistant: .....?
Caller: Dr. Frazier, please.
Assistant: .....?
Caller: This is Alex Frazier, Dr. Frazier's son.
Assistant: .....
Caller: Thank you.

Dialogue 3

Assistant:	Dr. Willis' office. May I help you?
Patient:	.....
Assistant:	I'm talking to someone on another line. Would you hold for a moment or may I call you back
Patient:	.....
Assistant:	...Thanks for holding. Did you say you'd....

Dialogue 3

Assistant:	.....?
Patient:	I'd like to make an appointment.
Assistant:	.....?
Patient:	I'll hold.
Assistant:	.....

ON YOUR OWN - 1

Student A

1. Cll (Intercom x30) and ask for Denise McCarthy. Tell her you can't come to school tomorrow.

2. Cal (Intercom x30) and ask for your telephone teacher. If she's not available, call back later.

3. Call (Intercom x30) and ask for one of your classmates. Tell him/her you can have lunch with her next Tuesday.

4. Call (Intercom x30) and ask for a classmate. You need to borrow his/her homework as soon as possible.

5. Call (Intercom x30) and ask for Laura Chow.

Student B

ANSWER THE PHONE AND, IF NECESSARY, TAKE A MESSAGE.

PRACTICE

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
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MESSAGE _____

IMPORTANT MESSAGE

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DATE _____ TIME _____ A.M. P.M.

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TELEPHONED		PLEASE CALL	
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RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

IMPORTANT MESSAGE

FOR _____

DATE _____ TIME _____ A.M. P.M.

M _____

OF _____

PHONE _____
AREA CODE NUMBER EXTENSION

❑ FAX

❑ MOBILE _____
AREA CODE NUMBER TIME TO CALL

TELEPHONED		PLEASE CALL	
CAME TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		SPECIAL ATTENTION	

MESSAGE _____

SIGNED

SECTION 3: HANDLING EMERGENCY CALLS

WHAT IS AN EMERGENCY CALL

An emergency call represents a serious, potentially life-threatening situation. An emergency is apparent when a patient on the phone complains of chest pains, for example, or reports bleeding profusely, shaking violently, or being short of breath. Emergency calls should therefore be screened carefully and handled efficiently and quickly.

Some emergencies, such as internal bleeding or allergic reactions, are not as easy to identify. It's the medical assistant's responsibility to screen emergency calls and obtain the required information.

Nevertheless, only the doctor, who has the medical background or authority, can determine what is an emergency and what is not. If you, as a medical assistant, are uncertain if an apparent emergency is real, you should alert the physician immediately.

The following is a list of examples of life-threatening emergencies.

MEDICAL EMERGENCIES

heart attack
drug overdose
profuse bleeding
extreme fever
allergic reaction (food, bee sting)
food poisoning
gunshot wound
suicidal behavior
premature labor
foreign objects in windpipe
damage to eye

Adapted from *Contemporary Medical Office Procedures*

HOW TO HANDLE AN EMERGENCY

1. Identify the type of emergency.
2. Listen carefully, remain calm, and speak normally.
3. Ask direct questions to obtain enough information in order to determine whether the physician should be interrupted. For example,

Information	Question
i. The name of the patient	i. What is your/his/her name?
ii. The relationship of the caller	ii. Are you related to him (the patient)?
iii. The nature of the emergency	iii. What happened?
iv. When the emergency occurred	iv. When did it happen?
v. The extent of the emergency	v. How bad?
vi. Symptoms	vi. Is he bleeding? Profusely?
vii. Treatment	vii. What has been done for him?
viii. Ambulance	viii. Have you/has anyone called an ambulance?
ix. The name of the patient's physician	ix. Does he have a primary care physician? What's his name and number?

4. Ask the physician to help you prepare a list of questions to ask in specific situations, for example, in the case of a premature labor.

WHAT TO SAY IN AN EMERGENCY

Listen to the dialogues and answer the questions.

Dialogue 1

1. What did the assistant say when the caller/patient insisted on talking to the doctor?
2. Did the assistant ask questions about the patient's symptoms?
3. Did the assistant think the patient had a premature labor?
4. Did the assistant interrupt the doctor? What did she say to the patient?

Dialogue 2

1. What did the assistant say when the patient said he didn't want to make an appointment and he just wanted to talk to the Doctor?
2. Did the assistant ask questions about the patient's symptoms?
3. Do you think the assistant got enough information of he patient's condition?
4. Did the assistant tell the patient what medical problem he might be experiencing?
5. Did the assistant interrupt the doctor? What did she say to the patient?

DIALOGUES

Listen to the dialogues between a medical assistant and callers. Pay attention to the type of questions the assistant asks.

Dialogue 1

Assistant:	Good afternoon. Doctor's office. May I help you?
Caller:	I need to talk to the doctor right away. I'm five months pregnant and I think I'm in labor.
Assistant:	What's your name?
Caller:	Camellia Roberson, but I need to talk to Dr. Baker.
Assistant:	I will get Dr. Baker, but first, I need to be able to tell him your symptoms. Are you in pain?
Caller:	I have awful stomach cramps.
Assistant:	When did they start?
Caller:	About 15 minutes ago.
Assistant:	Are you spotting blood?
Caller:	Not really.
Assistant:	Have you lost any clear fluid from your vagina?
Caller:	No.
Assistant:	Do you have a fever?
Caller:	I don't know. I haven't taken my temperature.
Assistant:	Do you feel hot?
Caller:	I don't think so.
Assistant:	Is this your first pregnancy?
Caller:	Yes.
Assistant:	When did you eat last?
Caller:	I had lunch about three hours ago.
Assistant:	Did your pain start after lunch?
Caller:	Yeah.
Assistant:	What telephone number are you calling from?
Caller:	235-3492. Are you getting Dr. Baker?
Assistant:	Dr. Baker is treating another patient right now, but he should be finished in about 5 minutes. I'll tell him about your symptoms immediately, and he will call you back.

Dialogue 2

Assistant:	Dr. William's office. May I help you?
Caller:	This is Albert Rose. I'd like to talk to Dr. Williams. I'm his patient.
Assistant:	I'm sorry, Dr. Williams is with a patient at the moment. Would you like to make an appointment?
Caller:	No, I'd like to talk to Dr. Williams, please.
Assistant:	Is your call about a medical problem?
Caller:	Yes.
Assistant:	I will get Dr. Williams, but first, I need to be able to tell him your symptoms.
Caller:	I'm not feeling well.. my left arm tingles, I'm sweating, and I'm having trouble breathing.
Assistant:	When did it start?
Caller:	About an hour ago.
Assistant:	Does your chest hurt?
Caller:	Not right now, but I had really bad pains a few minutes ago, and that's why I called.
Assistant:	Have you taken any medication since it started?
Caller:	No.
Assistant:	Is anyone with you, Mr. Rose?
Caller:	No.
Assistant:	**I'll get Dr. Williams. Just stay by the phone and he'll be right with you.**

UNIT 4: PATIENT CONFIDENTIALITY

SECTION 1: GIVING CONFIDENTIAL INFORMATION ON THE PHONE

(review *Patient Relations and Workplace Communication* Unit 4)

DIALOGUES

Listen to the dialogues. Practice them with a partner.

Dialogue 1

Assistant: Doctor Zimmerman's office. May I help you?
Caller: This is Charles Walters from American Insurers. I'd like some information about your patient, Roberta Sanchez.
Assistant: How may I help you?
Caller: Her insurance claim form shows that she had a Hysterectomy June 14. Why was that necessary?
Assistant: **I'm sorry, I can't give you that information without the patient's authorization. Please send us a signed release and we will provide the appropriate information.**

Dialogue 2

Assistant: Good morning, Dr. Wong's office. How may I help you?
Caller: This is Jerry Arthur. One of my employees, Jose Rodriquez, is Dr. Wong's patient. I need to know the result of the test you did during his last visit.
Assistant: Do you have his signed approval?
Caller: Not really.
Assistant: **I'm sorry, I can't give you any information without the patient's authorization.**

Dialogue 3

Assistant: Good afternoon, Doctor's office. May I help you?
Caller: Yes. This is Mrs. James O'Connor. I heard that my daughter was brought in this morning. What did the doctor say?
Assistant: Mrs. O'Connor, I'm afraid I'm unable to provide the appropriate information.
Caller: Well, Dr. Williams is our family doctor. He has known us for years and he knows my daughter has been sick for a while.
Assistant: **I understand that, but I'm not in the position to give you that information. If you will leave your number, I'll ask Dr. Williams to return your call.**

USEFUL EXPRESSIONS

I'm sorry, but I can't give you any information without | the patient's authorization.
permission

I understand that, but | I'm not in the position to give you that information.
I'm afraid I'm not allowed to release that information.

If you will leave your number, I'll ask Dr. Williams to return your call.

Please send us a signed release and we will provide the information.
We need a written release from the patient before we can give you any information.

PRACTICE

Dialogue 1

Assistant:	Dr. Wang's office. May I help you?
Caller:	.....
Assistant:	How may I help you?
Caller:	.....
Assistant:	**I'm sorry, I can't give you that information without permission. Would you send us a signed release from the patient?**

Dialogue 2

Assistant:	Dr. Wang's office. May I help you?
Caller:	.....
Assistant:	Do you have his signed approval?
Caller:	.....
Assistant:	**I'm sorry, I can't give you any information without the patient's authorization.**

Dialogue 1

Assistant:	.....?
Caller:	This is Chuck Rogers at the All-American Insurers. I need some information about Oscar Sanchez.
Assistant:	.....?
Caller:	We're investigating his insurance claim. We know the treatment he received last month.
Assistant:	.....?

Dialogue 2

Assistant:	.....?
Caller:	This is Jeremy Penn. One of my employees, Milton Torres, is Dr. Wang's patient. I need to know if Milton has AIDS.
Assistant:	.....?
Caller:	No, not really.
Assistant:	.....

Dialogue 3

Assistant:	Dr. Yee's office. May I help you?
Caller:	.....
Assistant:	I'm afraid I'm not able to give you that information.
Caller:	.....
Assistant:	**I understand that, but I can't give you any information without permission.**

Dialogue 3

Assistant:	.....?
Caller:	This is Daisy. I heard that my friend Abby Luu came to your office yesterday. She didn't come to class today. What happened?
Assistant:	.....
Caller:	Well, we're all good friends, and I know Dr. Yee, too.
Assistant:	.....

REVIEW

Read the sentences. Which one is the patient, A or B? Rearrange the sentences and make it a telephone dialogue.

1. A: Are you Dr. Brown's patient?
2. B: This is Louis Chin.
3. A: Dr. Brown is with a patient. May I ask who's calling?
4. B: I just need to talk to Dr. Brown and ask him a few questions.
5. A: And what is this regarding?
6. B: That's okay. I'll call back later. Bye.
7. A: Good morning, Doctor's office. May I help you?
8. B: I'd rather talk to Dr. Brown. When will he be available?
9. A: He has a full schedule today, but if you will leave your name and number, I'll have him return your call.
10. B: No, I'm with Zenith Investigation.
11. A: Is there anything I can help you with?
12. B: Yes, Dr. Brown, please.

UNIT 5 MEDICAL PHONES

SECTION 1: POLITE QUESTION STRATEGIES ON THE PHONE

LISTENING

Listen to each question. Check "APPROPRIATE" if it is a question the assistant should ask. If not, check "INAPPROPRIATE".

	APPROPRIATE	INAPPROPRIATE		APPROPRIATE	INAPPROPRIATE
a.	_____	_____	e.	_____	_____
b.	_____	_____	f.	_____	_____
c.	_____	_____	g.	_____	_____
d.	_____	_____	h.	_____	_____

DISCUSSION

A. Review the questions to which you have just listened. Explain why some are appropriate yet some are not.	B. Put the *appropriate* questions in sequential order.
a. Where is the pain?	_____
b. When did it happen?	_____
c. Are you Chinese?	_____
d. Could you describe the pain, please?	_____
e. What's your problem?	_____
f. Are you able to pay for the visit?	_____
g. What is the reason for your visit?	_____
h. Are you Dr. Owen's patient?	_____
	_____

SECTION 2: DISCUSSING MEDICAL PROBLEMS AND SYMPTOMS

READING

Read the two sets of questions below.

A. Please tell me more about your pain. **Could you tell me more about your pain, please?** **Would you describe your pain, please?**	**B. When did it happen?** **How long have you had the pain?** **Where exactly does it hurt? your ankle or foot?**

Now, find a partner and discuss the following questions. Then, report your answers to the class.

1. Compare all the A questions. Are they the same?
2. Compare all B questions. What type of questions are they?
3. Compare A questions and B questions. Are they the same or different? What is the same and what is different?
4. When do you think should an assistant use A questions?
   And B questions?
5. If you were a patient, would you like to answer A or B questions? Why?

LISTENING

Listen to Conversation A. Then, answer the following questions.

Conversation A

Circle your answers.

1. Were the assistant's questions appropriate? YES NO MAYBE
2. Was the patient upset because of the questions? YES NO MAYBE
3. Did the assistant ask those questions politely? YES NO MAYBE
4. Did she get enough information from the patient? YES NO MAYBE

Conversation B

And what's the reason for your visit?
I'd rather tell Dr. Simon about it
I understand - may be difficult for you to explain it, but can you tell me what it involves?
My feet hurt. I use only my wheelchair.
I see. Do you have a disability?
Are you able to come in for your regular appointment?

Circle the answers.

1. Were the assistant's questions appropriate? YES NO MAYBE
2. Did she ask the questions politely? YES NO MAYBE
3. Did she get enough information from Mr. Wiley? YES NO MAYBE
4. Was Mr. Wiley comfortable talking about his medical problem? YES NO MAYBE
5. Was he upset about the assistant's questions? YES NO MAYBE

USEFUL EXPRESSIONS

DON'T SAY:	SAY IT LIKE THIS:
What's your problem?	what seems to be the problem?
What's wrong?	What's your medical problem?
	What's the reason for the visit?
	What's the purpose of your visit?
	Why would you like to see Dr. Ma?
Are you crippled?	Do you have a disability?
	Do you have any disabilities?
You have to tell me what's wrong.	Could you tell me what it involves?
We have to know your problem.	Can you give me an idea of the general nature of your illness?

PRACTICE

Find a partner and role play the following situations. Fold the paper along the middle line and look only at your part. Follow the example.

Example: (instructions)

Student A: *You work at Dr. Sam Thornton's office. A patient calls.*

Student B: *You can't breathe well and you feel dizzy all the time. You also have high blood pressure. Call your doctor, Dr. Thornton.*

(what you should do)

Student A: Dr. Thornton's office. May I help you?

Student B: I need to talk to Dr. Thornton.

A: Are you Dr. Thornton's patient?

B: Yes, I am.

A: May I have you name, please?

B: Roger Lee. Can I talk to Dr. Thornton?

A: Dr. Thornton is with a patient right now. Are you calling for a medical problem?

B: .....

Student A

1. You work at Dr. Michael Rain's office. A patient calls for an appointment.
2. You work at the Children's Hospital. Answer the call from a new patient.
3. You have a stomachache. Call your doctor, Dr. Main, for advice or for an appointment.
4. You fell and hurt your ankle last weekend. It swelled a little but you can still walk. Call Dr. Ruth Tucker.

Student B

1. Call your doctor, Dr. Michael Rain, because your back hurts.
2. You have a sore throat, running nose and a terrible headache. Call Dr. Penn.
3. You are Dr. Main's medical assistant. A patient calls for an appointment.
4. You work at Dr. Ruth Tucker's office. Answer the call.

PRONUNCIATION & INTONATION

A. Listen and practice the questions.

RISING INTONATION	FALLING INTONATION
Does your foot hurt?	Where are the pains?
Could you describe the pains?	What happened?

B. Listen to each question and check "RISING" of "FALLING" intonation.

RISING	FALLING	
_____	_____	1. May I help you?
_____	_____	2. Are you Dr. Arthur's patient?
_____	_____	3. What is the reason for your visit?
_____	_____	4. How long have you had the pain?
_____	_____	5. Could you describe the symptoms?
_____	_____	6. Where does it hurt?
_____	_____	7. Was it an accident?

C. Work with a partner. Review the above questions and answer the questions below.

I. When do you use a rising intonation?

II. When do you use a falling intonation?

D. Listen to the conversations and answer the following question.

CONVERSATION 1	CONVERSATION 2
A: **When did you hurt your foot?**	A: What happened?
B: Yesterday morning.	B: I hurt my foot yesterday morning.
	A: **When did you hurt your foot?**
	B: Yesterday morning.

Why does the question, "**When did you hurt your foot?**" have different intonations?

SECTION 3: MAKING/ACCEPTING REFERRALS

1. Have you been referred by your doctor to another doctor?
2. When does a doctor need to refer his/her patient(s) to another doctor?
3. What are the assistant's responsibilities for making or accepting referrals?

DIALOGUES

Listen and practice the dialogues..

Dialogue 1

A patient is asking questions about a referral sheet.

Patient: ...Dr. Segars asked me to get an X-ray at St. Mary's Hospital. I'm not sure what I should do.

Assistant: Do you have a referral sheet?

Patient: Yes, here you go.

Assistant: Well, you need to call the Mercy Imaging Center and make an appointment. Would you like me to do it for you?

Patient: That'll be very nice.

Assistant: What will be a good time for you?

Patient: It doesn't matter.

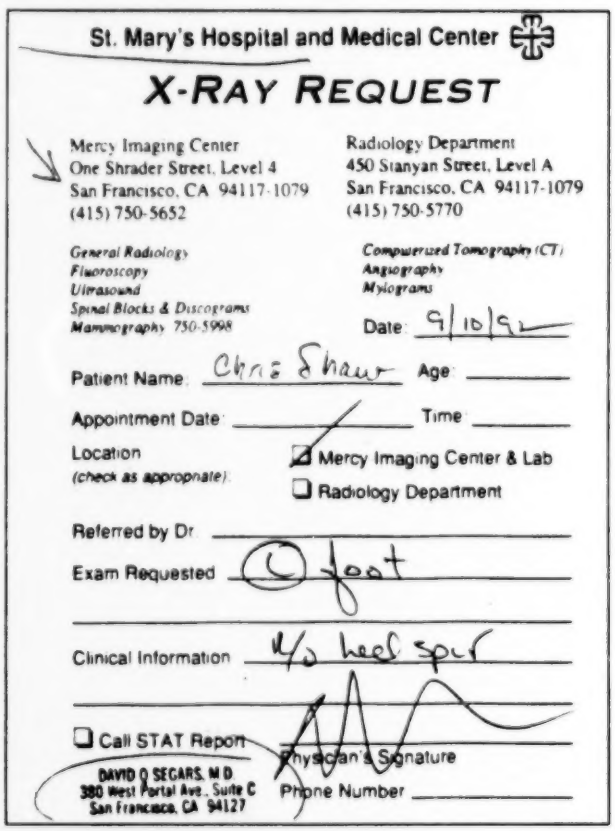
Assistant: Okay. Just a minute.... ...Would 10:00 Friday morning okay, Chris?

Patient: Yes.

Assistant: Alright, the appointment will be 10 a.m. Friday.

Patient: Thanks a lot.

Assistant: We need to schedule a time for a follow-up check up after the X-ray. Can you come in sometime next week?



St. Mary's Hospital and Medical Center

X-RAY REQUEST

Mercy Imaging Center
One Shrader Street, Level 4
San Francisco, CA 94117-1079
(415) 750-5652

Radiology Department
450 Stanyan Street, Level A
San Francisco, CA 94117-1079
(415) 750-5770

General Radiology
Fluoroscopy
Ultrasound
Spinal Blocks & Discograms
Mammography 750-5998

Computerized Tomography (CT)
Angiography
Myograms

Date: 9/10/92

Patient Name: Chris Shaw Age: _____

Appointment Date: _____ Time: _____

Location (check as appropriate): ☑ Mercy Imaging Center & Lab ☐ Radiology Department

Referred by Dr. _____

Exam Requested: L foot

Clinical Information: R/O heel spur

☐ Call STAT Report

Physician's Signature

DAVID O SEGARS, M.D.
380 West Portal Ave., Suite C
San Francisco, CA 94127

Phone Number _____

Dialogue 2

Dr. Segars' assistant is calling St. Mary's Hospital to make an appointment for a patient.

Operator:	St. Mary's Hospital. May I help you?
Assistant 1:	Mercy Imaging Center, please.
Operator:	One moment.
Assistant 2:	Mercy Imaging Center. This is Debby.
Assistant 1:	This is Dr. Segars office. One of our patients needs an X-ray taken of her foot.
Assistant 2:	What's the name of the patient?
Assistant 1:	It's Chris Shaw.
Assistant 2:	Does she have insurance?
Assistant 1:	Yes and they will pay for X-ray. The insurance information is on the referral sheet which the patient will bring to you.
Assistant 2:	All right. Can he come in at 10 a.m. Friday?
Assistant 1:	Could you hold a moment?
Assistant 2:	Certainly.
Assistant 1:	...Yes, Friday morning is fine.
Assistant 2:	All right. Thank you.
Assistant 1:	Thanks. Bye.

Dialogue 3

A patient calls Dr. Mitchell's office for a referral.

Assistant:	Dr. Mitchell's office. May I help you?
Caller:	I'd like to talk to Dr. Mitchell, please.
Assistant:	I'm sorry, Dr. Mitchell is with a patient. May I ask who's calling?
Caller:	This is Beverly Neal. I'm Dr. Mitchell's patient.
Assistant:	Would you like to make an appointment, Beverly?
Caller:	No, I'd like to talk to Dr. Mitchell.
Assistant:	Is your call about a medical problem?
Caller:	Yes.
Assistant:	If you tell me your symptoms, I'll check with the nurse who's available.
Caller:	Well, I think I might have broken my arm when I fell yesterday, and I wanted Dr. Mitchell to check it.
Assistant:	Beverly, Dr. Mitchell will want you to see an orthopedist. He refers all our patients to Dr. Carolyn Berry who is in our same building. Dr. Berry's phone number is 861-2379. After checking your arm, Dr. Berry will send a report to Dr. Mitchell.
Caller:	Thank you. I'll call and make an appointment.

USEFUL EXPRESSIONS

WHAT TO SAY TO THE PATIENT

Dr. Teng would like you to be examined by a cardiologist.
Dr. Teng will want you to see an orthopedist. He refers all our patients to Dr. Carolyn Berry.
You need to do a blood test at the Pacific Laboratory.
We would like to refer you to Dr. Perry. She's a psychiatrist.

HOW TO MAKE AN APPOINTMENT

One of our patients needs to have an X-ray taken of her foot.
Dr. Teng would like one of our patients to be seen by Dr. Berry.
Dr. Teng would like to refer one of our patients to Dr. Berry.
Would you be able to fit in one of our patients today?

READING

Read the dialogue between an assistant and a patient and fill in the blanks using the above expressions as your reference. Then, find a partner and practice the dialogues.

Patient: Dr. Teng asked me to get an EKG done next week.
Assistant: Oh, that's right, Cindy. _____.
Patient: But I don't know any cardiologist. I'm new in town.
Assistant: _____. He's at 455 Sutter.
Patient: Do I need to make an appointment?
Assistant: Yeah. I can do it for you now if you'd like.
Patient: That'll be very nice.
Assistant: All right. Just a second...
(on the phone) Hi, this is Alice at Dr. Teng's office. _____.
(to the patient) When will you be able to come in?
Patient: How about today?
Assistant: Okay. One moment.
(on the phone) _____?
...Thank you. Her name is Cindy Lee.... Okay. Bye.
(to the patient) Your appointment is at 3:00 this afternoon. Here's a referral sheet. Bring it with you and give it to the assistant at Dr. Berry's office.
Patient: Thank you very much.

ROLE PLAY

Role play the following situations with a partner. Follow the instructions.

Student A -- Assistant

1. You work at Dr. Klein's office and he refers his patients to a pediatrician, Dr. Joan Riley, as needed. Dr. Riley's office is two blocks from Dr. Klein's. Answer the call and offer help whenever you think the patient may need you to make an appointment. Ask the patient when it'll be convenient for him/her first.

2. You work at Dr. Klein's office. Dr. Klein always refers patients to Dr. Meng, whose office is in the same building as yours, for physical therapy. Answer the call and offer help.

3. A patient had called and complained about a broken arm. The doctor wanted her to have an X-ray taken first. Call the patient back and tell her to go to St. Luke's Hospital to have an X-ray taken of her arm. Offer help if the patient needs assistance in making an appointment.

Student B -- Patient

1. Your daughter, Amy, has lost her appetite and has refused to eat. She often complains about a terrible sore throat which also gives her headaches. Call your doctor, Dr. Klein, and ask him what you should do.

2. Your doctor, Dr. Klein, wanted you to get physical therapy for back pains during your last visit. Call his assistant for a referral. Also, ask if he/she could make an appointment for you.

3. You fell from a tree and broke your arm. You left a message to your doctor about it, and now his assistant is calling your back. Listen carefully and ask the assistant to help you make an appointment. You are available Friday afternoon after 2:00.

SECTION 4: HANDLING TROUBLESOME CALLS

LISTENING

Listen to the dialogues and answer the questions.

Dialogue 1

1. What questions did the assistant ask to obtain more information?

2. Why would the caller/patient need to talk to the doctor?

3. Did the assistant interrupt the doctor? Why or why not?
   Did the assistant offer to take a message?
   Did the assistant schedule an appointment for the caller?

Dialogue 2

1. What questions were asked after the caller ask for the doctor?
   → *Are you a patient?*
   →
   →
   →

2. What did the assistant say to obtain the caller's name and the name of his company?

   _____

   _____

3. Did the assistant make an appointment with the doctor for the caller? Why or why not?

   _____

   _____

DIALOGUES

Read the dialogues to which you have just listened.

Dialogue 1

Assistant: Good morning. Doctor's office. May I help you?
Caller: This is Fay Wang. I'd like to talk to Dr. Kwan, please.
Assistant: Is this about a medical problem?
Caller: Yes.
Assistant: Dr. Kwan is with a patient. May I ask why you wish to talk to the doctor?
Caller: I need to ask Dr. Kwan about trying a new gauze bandaging.
Assistant: Dr. Kwan prefers to review new products before having the patient try them. Perhaps you would like to make an appointment with Dr. Kwan.
Caller: No, I'd prefer to talk to Dr. Kwan. If she's too busy today, I'll call back another day.
Assistant: I'm sorry, but Dr. Kwan won't be able to decide whether of not you should be on this new product on the phone.
Caller: Maybe she knows this product once I explain it to her. I just need to talk to her and it won't take long.
Assistant: I'm sorry, but I can't interrupt the doctor.

Dialogue 2

Assistant:	Doctor's office. May I help you?
Caller:	I'd like to make an appointment with Dr. Kwan, please.
Assistant:	Are you a patient?
Caller:	No.
Assistant:	Does your appointment concern one of our patients?
Caller:	No.
Assistant:	May I ask the reason of the appointment then?
Caller:	It's personal.
Assistant:	Are you a friend of Dr. Kwan?
Caller:	Not really. We met once or twice at a conference.
Assistant:	I'm sorry, but without more information, I'm unable to schedule an appointment. Would you give me your name and the name of your organization, please?
Caller:	Mike Robertson, Zenith Medical Office Technology.
Assistant:	Is this a sales call regarding one of your products?
Caller:	Well, I wouldn't say so. I just want to introduce to him the new computer software we've developed especially for medical offices.
Assistant:	Perhaps I could review your software. If you send me a brochure and any information you think I should have, I'll be glad to study it.
Caller:	Do you make the purchasing decisions?
Assistant:	I only make recommendation to Dr. Kwan.
Caller:	Since this represents a major purchase, I think I should make an appointment with Dr. Kwan then.
Assistant:	I'm sorry, Dr. Kwan would not be available.

Patient and non-patient appointments

Patients may request to talk to the doctor on the phone before asking for an appointment. For patients, obtain as much medical information as possible and offer to schedule an appointment if it is not an emergency.

People besides patients (such as sales representative for pharmaceutical companies or medical equipment manufacturers) may also request appointments with the doctor. Screen the calls, ask questions that will extract the information you need (such as the purpose of the appointment) yet do not schedule them unless you believe their business can be handled only by the doctor.

For such callers as the doctor's accountant, attorney, or representative from civic or charitable organizations, ask the doctor which people should be scheduled routinely, and schedule them at a time that will not interrupt the daily routine (such as in the late afternoon).

UNIT 6 SCHEDULING

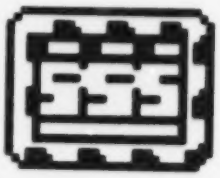
GETTING READY

Answer the questions by checking "YES" or "NO".
Explain why you checked YES or NO after comparing your answers with others'.

	YES	NO
1. Scheduling can be done by hand in a schedule book or with a computer using scheduling software.	___	___
2. In a medical office, it is normal that an assistant constantly schedules, reschedules, and cancels appointments.	___	___
3. A medical assistant schedules patient appointments in a schedule book and non-patient appointments in a different appointment book.	___	___
4. If the patient who calls for an appointment is in an urgent condition, you will have to make time during the day for the patient to see the doctor.	___	___
5. Appointments are scheduled for the same amount of time.	___	___

Answer the questions by circling the right answers.
There may be more than one answer to each question.

6. A medical assistant schedules appointments based on



   a. the severity of the patient's medical problem
   b. the available appointment
   c. the patient's request
   d. the doctor's availability

7. Successful scheduling depends on
   a. communication skills
   b. organizational skills
   c. honesty
   d. less vacant time periods or time gaps

8. A scheduled appointment includes
   a. the patient's name
   b. the patient's phone number
   c. the patient's age
   d. the time of the patient's appointment
   e. the reason for the visit (medical problems and symptoms)

9. Patient appointments are usually requested by
   a. the patient
   b. the patient's relative
   c. the patient's insurance company
   d. the doctor or nurse
   e. a referring doctor

10. Choose the right procedures for appointment scheduling:
   a. ask the patient for a description of the symptoms
   b. use your judgment and decide if the patient is in a serious condition
   c. check the day's schedule for the first vacant time period
   d. give the patient one or two alternative times
   e. schedule the appointment according to the patient's wishes

SECTION 1: SCHEDULING FORMULA

Most practices develop a formula for scheduling that helps the scheduling assistant decide the amount of time each patient needs. The following is a typical formula for an internal medicine practice.

SCHEDULING FORMULA FOR INTERNAL MEDICINE PRACTICE	
New patients	30 minutes
Patients for consultation	45 minutes
Patients requiring complete physical exams	45 minutes
All other patients (minor illnesses, routine checkup, etc.)	15 minutes

If a patient's request for an appointment is urgent, look through the day's schedule for the first opening. If no openings exist, find a time when the patient can be squeezed in between appointments. *Though other patients will be delayed or even canceled, the assistant must make room in the schedule for an immediate examination for the patient.*

SCHEDULING TIPS

* *Ask new patient to arrive 15 minutes early to complete forms.*

* When a patient cancels his/her appointment: review the schedule, decide which patients can be moved to the opening, call them and find a patient who can make a change.

* *Schedule patients according to a specific category.*

> For example:
> All patients who require physical exams may be scheduled for early morning or late afternoon. Pregnant patients may be scheduled after lunch to avoid their "morning sickness".

* *Check with the doctor if specific appointment times should be set aside during the day or week for certain types of patients.*

> For example:
> New or expectant mothers may be scheduled on a specific day of the week. Designate a certain day of the week for consultations.

SECTION 2: THE APPOINTMENT BOOK

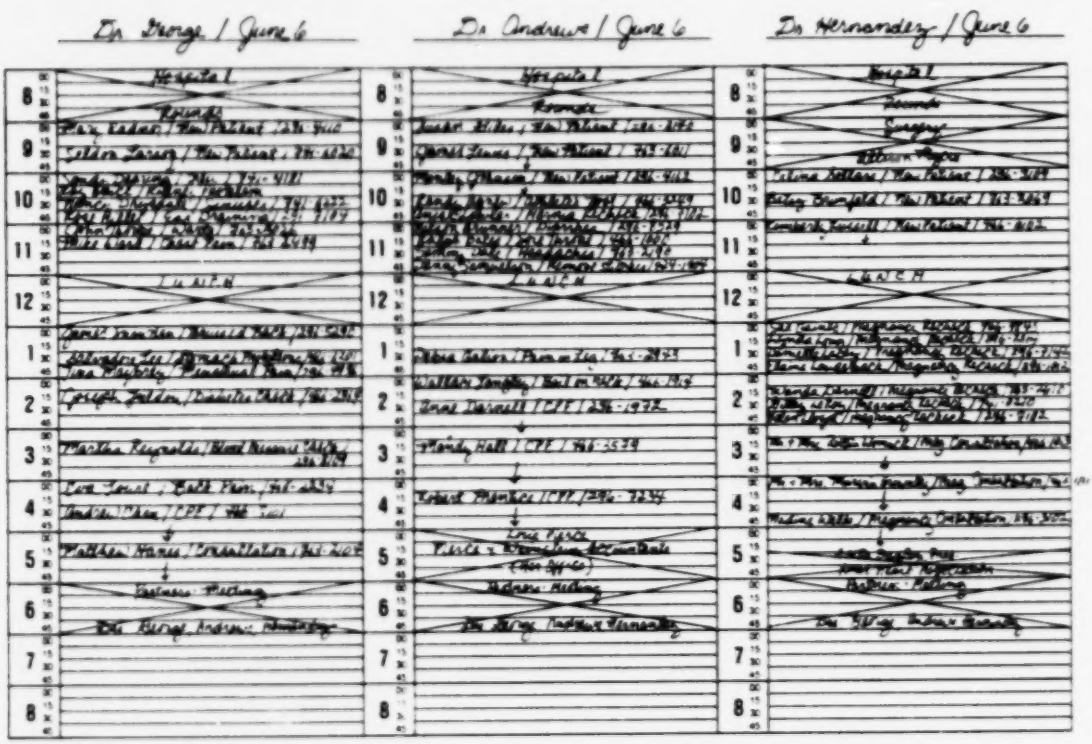
A typical appointment book is divided by days of the week. Each day is broken into 15-minute segments. See the example on the next page. The following is a list of **procedures to record an appointment in the appointment book**:

1. List the patient's first and last names/medical problem or reason for the visit/phone number. Mark "New" for new patients.

   Andrew Chen/CPE/466-3101
   James Lewis/new patient/973-6011

2. Block out as many 15-minute segments as necessary to provide necessary time for each appointment.
3. Review the appointment book at the end of each day to make sure it is accurate for all patients scheduled.

NOTE: Physicians may often be away from the office to make hospital rounds, perform surgery, or handle personal business, and these absences are also recorded in the appointment book with an "X" and a brief explanation. This information should not be given to patients.



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SECTION 3: OVERBOOKING PATIENTS

WHAT IS OVERBOOKING

Overbooking is scheduling more patients than the doctor can see during a reasonable period of time. The results of overbooking are: delayed schedule, frustrating patients and staff, unpleasant patient relations.

HOW TO AVOID OVERBOOKING

1. **Review the appointment book at the end of each day to be sure it is accurate for all patients seen that day.**
2. **Schedule a 30-minute break once or twice a day to ease scheduling pressure.**

   Review the appointment book age on the previous page. Are there such breaks in Dr. Gorge's, Dr. Andrews' and Dr. Hernandez' schedules?

SECTION 4: RESCHEDULING AND CANCELING APPOINTMENTS

How do you reschedule or cancel an appointment in the appointment book? Follow the procedures below.

PROCEDURES TO RESCHEDULE AN APPOINTMENT

1. Cross out the patient's name by drawing a line through it to indicate that the time period is now available for scheduling.
2. Give the patient one or two alternative dates and times.
3. Write down the patient's name and the reason for the visit to the new date and time.

For example:

Patient:	I'm really sorry, but I just can't make it Wednesday.
Assistant:	Well, it happens. Let me cross out your name first. Now, would you like to come on a later day?
Patient:	Sure. Either Thursday or Friday would be fine.
Assistant:	I have Thursday morning at 9:45 or 1:15 in the afternoon. Which one would be convenient for you?
Patient:	1:15 sounds good.
Assistant:	All right, John. I'll put you down for Thursday at 1:15.
Patient:	Thank you very much.

PROCEDURES TO CANCEL AN APPOINTMENT

1. Draw a line through the patient's name.
2. Record the cancellation in the patient's medical record.
   *If the same patient cancels several appointments, politely suggest that no further cancellations should be made. For example: "Ms. Tran, would you please check your calendar first, before we schedule this appointment? You had to cancel your three previous appointments.")

SECTION 5: HANDLING DELAYS

What causes delays?
Work with a partner and write down as many reasons as possible.

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When delays interrupt the appointment schedule, you need to adjust the daily routine so the medical staff can return to the schedule.

PROCEDURES TO ADJUST THE DAILY SCHEDULE

1. Inform the doctor/medical staff that appointments are behind schedule
2. Volunteer for some tasks, such as cleaning/setting up exam rooms, that other office personnel ordinarily handle
3. Determine whether late appointments can be rescheduled for another time. *Check with the doctor before doing so.*